COLLECTION TOOL SUPPORT GUIDE

(Version 6.0 – March 2021)

UCAS

Contents

1. Introduction

In the collection tool, you can add and manage course and provider information. The data feeds into Search, which prospective applicants and advisers use to search for courses.

It's important that your course and provider information is maintained in the collection tool and:

> is as current and complete as possible

> meets UCAS' data standards, as agreed in our terms and conditions of service – the system will give a warning if data fails validation

> is compliant with legal requirements, such as consumer protection laws, e.g. the requirements set out by the Competition and Markets Authority (CMA)

Please note that this guide will be updated regularly, to account for future revisions of the collection tool. We consider this to be an evolving document, as the system and needs change – as such, we would appreciate feedback on any areas you would like us to cover in future versions. You can send your feedback to the Collection Team at **coursesdata@ucas.ac.uk**.

2. Accessing the collection tool

To access the tool, you will firstly need to be set up as a user by someone who has user management permissions (see section 3). Once set up, you will need to click '**Sign in**', in top right-hand corner of the UCAS website (ucas.com), and select '**Providers**'.
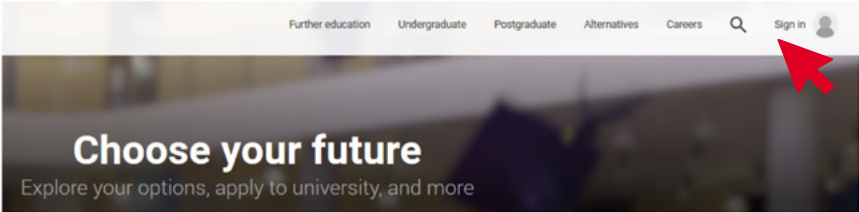
If you haven't yet registered, please do so by clicking '**Register here**', and following the instructions. If you've already registered, enter your details and click '**Sign in**'.

On the following screen, you will see your personalised dashboard. What will appear will depend on the permissions you have been assigned by a colleague with the required user management permissions.

3. User management

To give colleagues access to the collection tool, select 'Go to user management' from your dashboard.
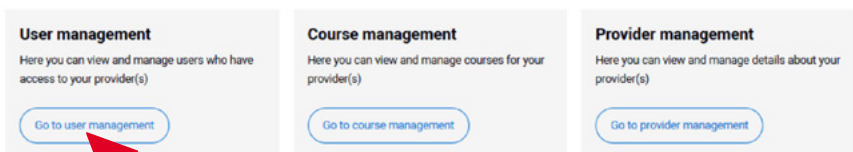
Once on the '**User management**' screen, click '**Add user**', enter the relevant email address, assign the permissions they require based on the below list, and click '**Add user**' again.

This will not generate an email to the new user. To complete the process, the staff member needs to register (if they have not done so already) by going to our website **www.ucas.com**, clicking '**Sign in**' from the top-right hand corner of the screen, and selecting '**Providers**'.
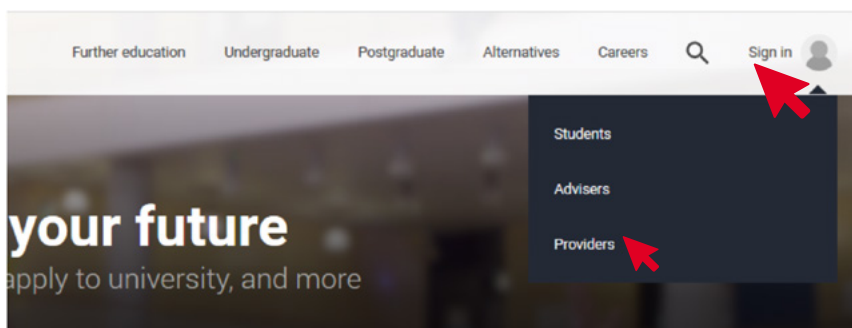
The screen below will be displayed. Click '**Register here**' and follow the instructions to create your sign in details. When the registration process has been completed, an automated email is sent containing a link to '**Activate account**'. Clicking this link will complete the process.

Once you have registered (or if you have already registered), return to the collection tool sign in page, enter the email address you registered with and your password, and click '**Sign in**'.

4. Provider management

To access your overarching provider information, click into the '**Provider management**' option on the collection tool dashboard
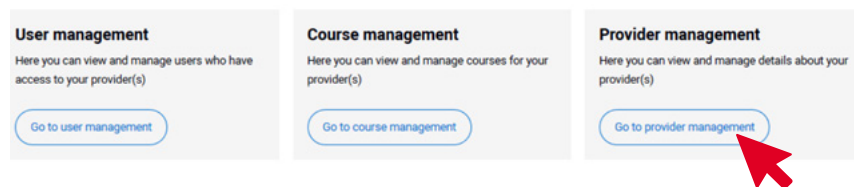
> **4a. Provider details**

The first screen you'll see is your main provider details. If you would like to amend any of this information (for example, your address, provider name, or website), please email us to request the change at **coursesdata@ucas.ac.uk**.

You can add a url link relating to a Covid-19 information page on your website. It's not possible to add the link yourself so please email it to us and we will upload it. The URL will be displayed to learners in Search, in the provider information section, on every course details page as a link titled 'Our Covid-19 information'.

Please note that the '**Aliases**' field can be used to add an alternative name that your provider is commonly known as and searched for by. An alias is used as an alternative term or abbreviation to find a course provider in the search tool. Please also note that location names will be picked up from the locations section and should therefore not be used as aliases.

The following options are available in the submenu on the left-hand side of the page:

> **4b. Course contacts**

Use this screen to enter your applicant-facing contact information. This will be displayed in the UCAS search tool. You can list either your general admissions phone number and email address, or specific contact information for academic schools or faculties.

Provider management
Aston University, Birmingham

Each course contact record must have a title. There is then the option to add an email address, phone number, and a fax number, if you wish.

You can add an online enquiry form url and a corresponding caption. The link will be accessed via the online enquiry form caption text in the search tool that displays alongside the contact information. You can add links to your course pages for any of the following social media channels; Facebook, Twitter, Instagram, LinkedIn, YouTube. These links will appear in the search tool, along with the other course contact details.

> **4c. Clearing contacts**

Clearing contacts are displayed in the UCAS search tool alongside your usual contact details, from July until September. This is an automatic change.

If you haven't entered any information here, we will use your default contact information. We would recommend adding contact information in all the following sections. Any changes you make to the main Clearing Contact are updated immediately in the search tool when the information goes live in July.

Confidential Clearing Contact – The Confidential Clearing Contact is designed to help providers contact each other during Confirmation and Clearing, when normal office numbers may be rerouted to Clearing lines. This number can either be a landline or mobile, and is only available for other providers to view in the secure section of ucas.com.

Text Alert Contact – The Text Alert Contact is used by UCAS to provide critical updates during Confirmation and Clearing, including processing of ABL files, and any system issues or outages. This number can be a work or personal mobile number, and is not visible to anyone outside of UCAS.

> **4d. Departments**

Departments are required to be able to add a new course to the collection tool. So, if you are setting yourself up for the first time, make sure you complete this section with departments, faculties, academic schools, or colleges.

> **4e. Locations**

You must set up one or more locations of study in order to add a course on the Course Management page of the Collection Tool. All locations require a

'Location code' – these are chosen by the provider. It would be wise to match any in-house code you currently use, or choose something connected, as this information will be seen by applicants.

Providers are able to add a 'Location category' to indicate whether the location is a 'Main site,' 'Campus,' 'Franchise location,' or 'College (College group).' If 'Franchise location' is selected, providers will be able to add a specific location URL, a TEF rating, and upload a logo for the location. If 'College (College group)' is selected, a specific location URL and logo can be assigned.
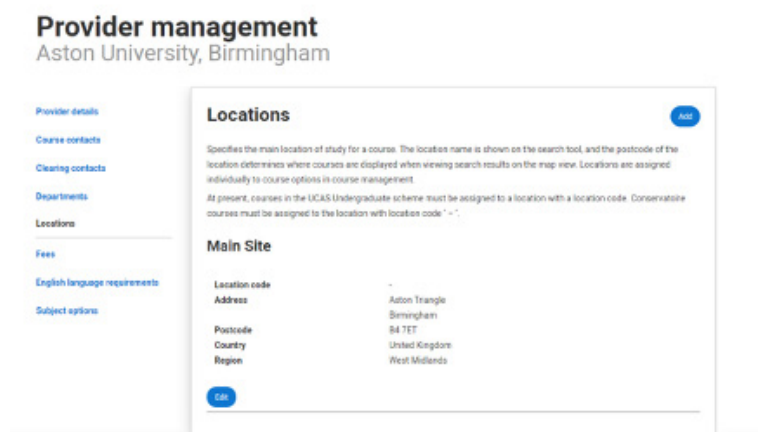
> **4f. Fees, English language requirements, and subject options**

These three areas all have a similar feature – you can fill in a single template and copy it across to all appropriate courses. However, if the fees change, you'll need to amend the template and then copy again to the courses. It does not update automatically.

5. Course management

> **5a. Course management page**

The new course management homepage is your starting point for accessing and amending course and vacancy information.

To access your course list, click the 'View all courses' button. From here, you can view the status of your courses in various formats.
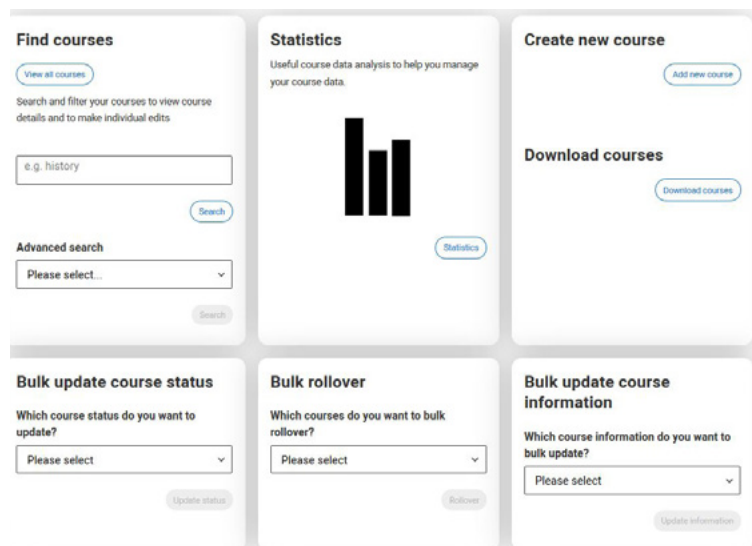
The search field at the top of the page can be used to search for an internal reference code you've assigned to a course, an application code, or a title of a course. This will find all unarchived versions of the course, across intakes.

At the top right of the page, there are three dots signifying a menu. There are three options – '**Bulk management**', '**Download courses**', and '**Statistics**'. Please note that all functionality accessed via the three dots can also be reached from the course management homepage.

> **Bulk management** – for updating the status or information of several courses, or rolling over course information from one intake year to another.

> **Download courses** – for producing and downloading a CSV report of your course information across several pre-set options.

> **Statistics** – a quick and easy way to assess and check the status of courses. Graphs are provided across schemes and intakes to show options, such as number of courses, published or unpublished, or open or closed vacancy status.

On the course management page, you can view your courses across all intakes. By default, archived courses are hidden from view. If you would like to view your archived courses, click the '**Filter courses**' option below the search field. Select the drop-down menu below '**View options**', and choose '**Show archived results**'.

Other filters are available, including academic year, outcome qualification, scheme, and open/published statuses. These filters will affect the course list that displays below the filter courses option.

Colours indicate the course level on the left of the course list – purple for postgraduate and red for undergraduate. The black triangle by a course title allows you to display some of the course option information without having to click into the course itself.

If you see multiple rows for a single course, this is because it is currently unarchived in multiple intakes.

To the right of the course information, it lists which intake the course is attached to.

To view the full course information, click the '**View**' button next to the intake.

When you are viewing a course profile, clicking '**Back to course list**' in the top-left hand corner of the screen will take you back to your course management page. Similarly, clicking '**Back to my dashboard**' on the course management page will return you to the dashboard.

> **5b. Create a new course**

On the course management page, click the '**Add new course**' button in the top right-hand corner.

Choose which level of study your course is.

Please note that UCAS has an agreement with providers for the listing of a number of full-time postgraduate courses in the UCAS UG scheme.

These are currently limited to postgraduate or pre-registration courses in:

> Midwifery

> Social Work

> Nursing

> Physician Associate Studies

Our undergraduate listings also include Scottish postgraduate teacher training qualifications (PGDE).

If your course is part-time, and therefore will not receive applications through UCAS, select '**Direct application only**.' If you select '**Direct application only**,' you will not need to create a UCAS application code. You will also not be able to open or close the corresponding course option, as it will not receive applications via UCAS. Please note that a part-time, direct application course option can also be added to an exisiting UCAS scheme undergraduate course. For the following example of creating a course, we will be adding a full-time UCAS scheme undergraduate course.

Make your selection, and click '**Next**'.

A confirmation message will display. If you are happy to proceed click '**Create course**'.

You can now create your course.

Choose a UCAS application code – this is the four-character alphanumeric code, that cannot contain the letter E – applicants will use this to apply. The code you create can be any combination of characters, and does not need to follow any convention.

Once you've chosen a code, it cannot be amended or assigned to more than one course.

You also need to select which academic year the course will running, e.g. 2019-20, 2020-21. An academic year runs from August until July.

Once you've completed the details above, you need to enter information into all the following mandatory data fields before you can save the course profile.

Course title – this can be a maximum of 150 characters and needs to accurately reflect the content of the course. Do not include any information that is listed elsewhere in the course profile, such as qualification outcome, study mode, etc. The search tool and Apply both display their lists alphabetically – as such, irrelevant information in the title may affect the expected positioning for a course.

Summary – use this field to inform potential applicants what to expect if they choose this course. Cover content and any information that you feel an applicant would want to know.

Short title – this field is automatically filled in for you, based on your main course title. This is used for our internal systems, and will not be displayed to applicants.

Abbreviated title – used for reference data in UCAS' backend systems, this is not publicly visible. The abbreviated title appears in your 'UG Courses' and 'PG Courses' reports that are run in the collection tool (see section 8) – you may want to take this into account when assigning abbreviated titles.

Department – you can select the department from a drop-down list which will reflects your master list of department titles in the provider management section (see chapter 4d).

Search subjects – a pre-populated list of words an applicant might use as a search term when looking for courses. You need to make at least one selection (although you may choose as many you like). Terms should be chosen which reflect the exact content of the course, or to provide alternative names for topics. Subjects must accurately reflect what is taught as part of the course. The search subjects are quality checked periodically by UCAS to ensure they are relevant to the course they are attached to.

HECoS subject codes – these codes are used for classification in our internal systems, by the SLC (Student Loans Company), and also for your HESA Return. Your planning department should guide you in your choices of HECoS subject codes. A list of available codes can be accessed on the HESA website to help with classification.

> **5c. Add outcome qualification**

Once you have created your course profile and clicked the '**Save**' button, you need to add an outcome qualification. Click the '**Add outcome qualification**' button and select from the '**Outcome qualification**' drop-down list. Click '**Save**' to confirm your selection. You can have as many outcome qualifications listed under a course profile as required.

There are no mandatory elements in the outcome qualification section. However, we recommend that you complete the assessment methods, modules, and provider course URL sections to give potential applicants as much information about your course as possible.

Business Rules – There is a 'business rule' drop-down menu in the Collection Tool, which enables you to assign the appropriate business rule for your courses, based on whether it is a standard course or a medicine, dentistry or veterinary science course. The business rule that you select will determine the number of course options a learner can apply to and ensure that only valid combinations of course options can be chosen by applicants to that course. It will also automatically determine the appropriate equal consideration deadline for the course.

Although not mandatory, we recommend that you complete the assessment methods, modules, and provider course URL sections to give potential applicants as much information about your course as possible.

Fees for the course can be entered in the outcome qualification section of a course profile, and these can be used as a default for all related course options, or you can add fees individually to each course option. Alternatively, you can copy fees from templates which can be set-up in the provider management section of the Collection Tool.

> **5d. Course options**

The third and final section of a complete course listing is the 'Course option'. Here you provide details about the specific intake, such as start date and location.

Click the '**Add course option**' button and populate the following mandatory fields:

Study mode – the attendance type for the course, e.g. full time, sandwich, or distance learning.

There are two new selections to the 'Study mode' drop-down menu, 'Blended learning (full-time)' and 'Blended learning (part-time)'. These new categories will enable the growing number of courses that are studied remotely but do require some attendance, to be listed correctly.

Start date – if the course has a specific start date, you must enter the day, month, and year, or if applicable, just the month and year. For courses where there is no specified start date, you can tick the 'start at any time' option.

Location – this is the place of study. The location requires a 'location code' assigned to it in provider management, for it to be available to select for UCAS Undergraduate courses.

Duration – you can either select a specified duration, or enter a range, e.g. two – four years.

Available entry points – courses will automatically default to accepting applications from students entering into the first year. You can add alternative entry points for courses that accept students joining courses in other years e.g. Foundation year, 2nd year etc.

Standard qualification requirements – See section 5h.

There are also non-mandatory data fields that can be completed, including:

Course code applications only (CCAO) – Courses with few vacancies remaining, and which would attract a high number of applications in Clearing, can be set to 'course code application only'. Select this flag for courses you don't want to display in Search or in the Track drop down list. Unplaced applicants will only be able to select courses marked as CCAO by manually entering the course application code into Track. Note that this tick box is available regardless of the current status of the course option, however, selecting the CCAO tick box will automatically change its status to 'Closed' and 'Unpublished'. The option to put a course into 'course code application only' will only appear once the equal consideration deadline of the course has passed

Accelerated degree – For English providers, there will be a tick box that can be used to indicate if your course option is an accelerated pathway. It is not possible to go into a course that is already published and open and add the accelerated flag, however you can copy an existing course option to which the accelerated flag can be added, then to go back and archive the 'original' option.

Deferred entry – Indicate if the course option is accepting applications for deferred entry.

Subject to validation – Here you can flag a course that is still subject to approval. The course will appear in the search tool for students to see.

Additional requirements – See section 5i.

English language requirements – Add any English language requirements to help international students see if they meet the required English language standard. You can add an overall score and additional information for each test.

Fees – We request that you enter fees for your course option. You can set up a default fee in the outcome qualification section of the course profile and apply it to your course options, or you can add fees individually to each course option. Alternatively, you can copy fees from templates which can be set-up in the provider management section of the Collection Tool.

When adding a fee you can specify which geographical domicile the fee applies to (e.g. England, Channel Islands, International, etc.). There are also tick boxes that can be flagged to denote if the course is free, or if the fee you've entered is a provisional amount. Flagging these tick boxes will result in a message displaying to potential applicants on the UCAS search tool.

Following the UK's departure from the EU we have made an update to the 'Fees' section. There is now an additional tick box for 'Republic of Ireland' so that you can list a unique fee for this domicile if you wish.

Click '**Save**' when you have completed your course options.

> **5e. Publishing courses**

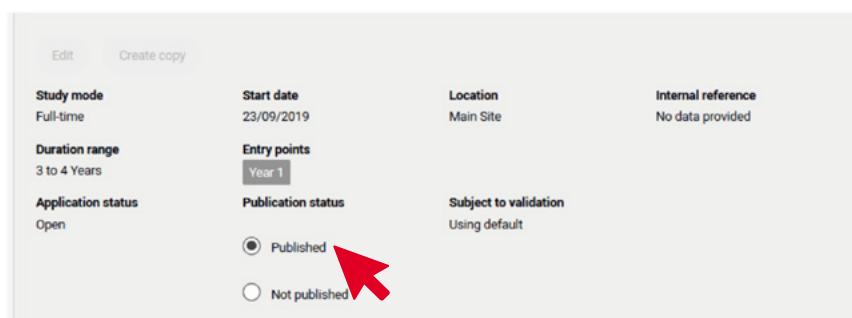The default status of your newly created course option will be

Application status: 'Closed'

Publication status: 'Not published'.

Therefore, it will not display in the UCAS search tool, or be selectable by applicants.

To set its status to published, go to the 'Bulk actions' drop-down menu directly above the first course option you have in your list. Select 'Publication status' and click the 'Go' button.

The following published/not published radio buttons below will be displayed. Make your selection and click the 'Save' button. It will only take a few seconds for your course to appear in the UCAS search tool.
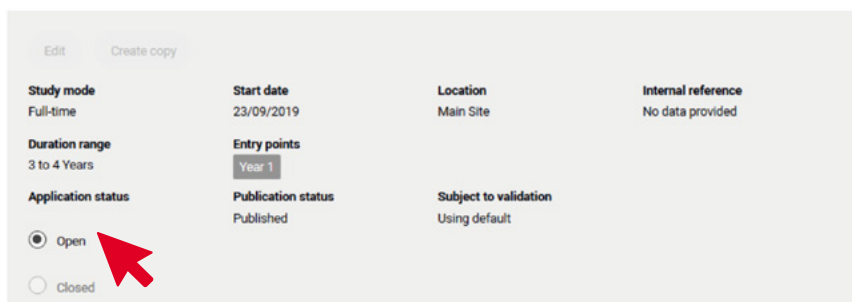

> **5f. Open for application**

Changing the application status of a course option to open is necessary for it to appear as an available selection in the UCAS Apply tool.

To amend the application status to '**Open**' go to the '**Bulk actions**' drop-down menu directly above the first course option in your list. Select '**Application status**' and click the '**Go**' button.

The following open/closed radio buttons will be displayed. Make your selection and click the '**Save**' button.

> **5g. Amend vacancies**

When your course option is open and published, and therefore able to receive applications by default, it will be listed as having vacancies.

Each course option will have a vacancy management section. '**No vacancies**' can be selected, once the relevant equal consideration deadline date has passed (this option will not be available before then).

Following the UK's departure from the EU we have made an update to the 'Vacancy management' section. Whereas previously vacancy management was split into Home/EU and International, there are now additional vacancy categories designed to help you better manage your vacancies. Please note that the categories available to you will be dependent on where your provider is located. For example, Scottish providers will have a separate 'Scotland' category which other providers will not have.

> **5h. Standard qualification requirements**

Each course option has an '**Edit qualification requirements**' link, which can be accessed by selecting the '**Edit**' button. As this is a mandatory requirement, you need to enter some information into this section to be able to save it.

There are several subsections, including:

> UCAS Tariff

> A level

> Pearson BTEC Level 3 National Extended Diploma

> Access to HE Diploma

> Scottish Higher

> Pearson BTEC Level 3 National Diploma

> Pearson BTEC Level 3 National Extended Certificate

> Scottish Advanced Higher

> International Baccalaureate Diploma Programme

Additional qualifications can be selected from a drop-down menu if required.

There is also a free text '**Further information**' field to add information if you want to, and a '**Provider entry requirements URL**' field.

Entry requirements for entry points beyond year one can be entered onto a course option. When selecting a point of entry other than year one or foundation year, an additional free text field will become available to capture these requirements.

Minimum entry requirements (Scottish only) – minimum qualification entry requirements can be added for a course from the 2020-21 intake onwards. The minimum requirements should reflect the grades that a widening access student will need to achieve by the time they enter university or college. A student should be able to successfully complete the course if they have these grades.

> **5i. Additional requirements**

Each course option has an '**Edit additional requirements**' link, which can be accessed by selecting the '**Edit**' button. There are tick boxes that can be checked to indicate various requirements such as Admission tests, Audition, Interview, and Criminal records declaration (DBS / Disclosure Scotland).

We request that you only ask applicants who apply for certain courses, for example, those that involve work with children and vulnerable adults, such as medicine, teaching or social work – to declare whether they have any criminal convictions, including spent convictions.

Please note: Once your course option has been published it will not be possible to add / remove the '**Criminal records declaration**' flag. UCAS has published a series of good practice resources to support providers.

There are various statuses you can assign to a course in the collection tool. Our search tool, Apply, and external course listing sites that we share information with are all impacted by changes to collection tool statuses. Below is a table showing the statuses and their outcomes.

Collection tool flag	Outcome	Note
Publish status	Adds or removes the course from the search tool and external course listing sites.	Timings vary between systems and our partner sites. Our search tool updates straightaway, but our partner sites may take longer.
Application status	Adds or removes the Apply button from the search tool. Prevents applicants from selecting the course in Apply.	This does not remove the course from the search tool, but does produce a flag to say the course is no longer open for applications.
Archive status	Unpublishes and closes the course.	This should be used if the provider is no longer running the course.
Vacancy status	Adds or removes the Apply button from the search tool. Prevents applicants from selecting the course in Apply.	This can only be amended once the equal consideration deadline date has passed for the course. This does not remove the course from the search tool, but does produce a flag to say the course is no longer open for applications.

> **5k. Editing a course**

Once a course has been created, it can still be edited in order to add additional information or to make an update. There are some exceptions however, such as the UCAS application code, which cannot be amended.

Please note that there will be an '**Edit**' button for each separate section of a course profile. Therefore you will need to click the relevant '**Edit**' button for the section you want to update. When in edit mode, all other 'Edit' buttons on a course profile will be inaccessible until you either click '**Cancel**' or '**Save.**'

6. Roll over course options to a new cycle

Course profiles in the Collection Tool belong to one or more specific academic years. Each May, the following year's list of courses will 'go live' in UCAS' search tool and Undergraduate Apply, with Conservatoires Apply going live in July. Leading up to this we request that all providers roll over their course list from one year to the next and make any required updates so that the search tool is populated with accurate course information. Please be aware, if you do not roll over your courses to the following intake, applicants will be unable to search or apply to your courses for that year.

To roll over courses in bulk on the Collection Tool you'll need to select '**Course management**' from your dashboard.
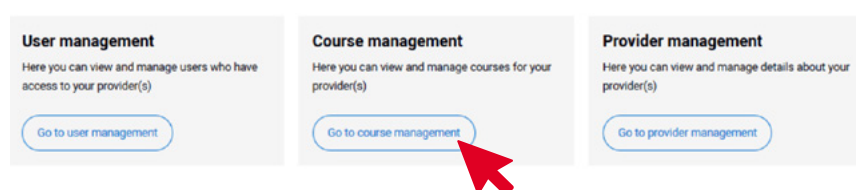
On the courses home page scroll down to the '**Bulk rollover**' tile. Select the correct scheme and click '**rollover**'.
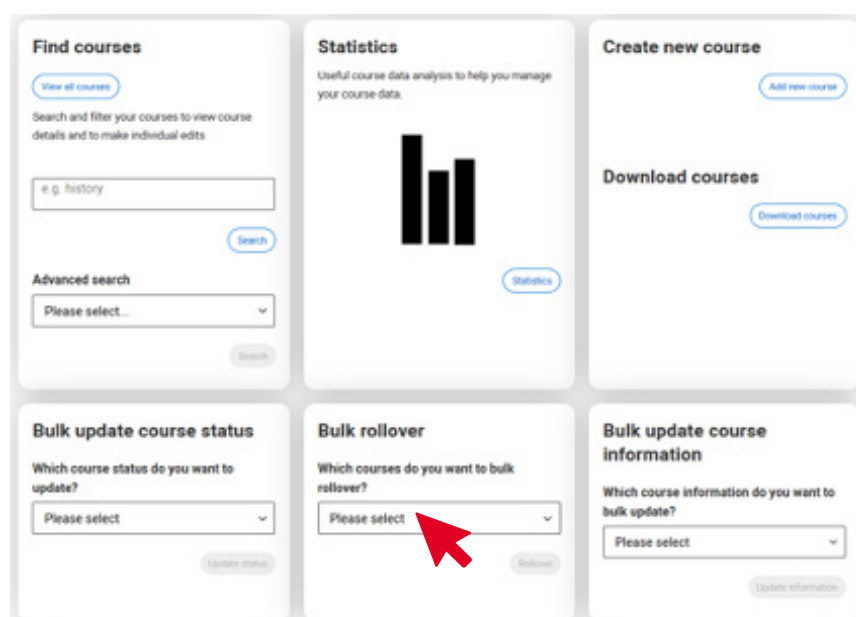
On the next screen select the year you are copying from (your source year) in the drop-down menu. Click the '**Next**' button that appears in the top right of your screen.

Search for the appropriate course(s) and click the corresponding tick box to the left of the course title, alternatively you can use the '**Select all**' button to select all the courses listed. Use the filters below the search field to narrow down the areas you are looking at, e.g. '**Academic Year**' or '**Publication Status**' etc. Once you've chosen all the courses you would like to rollover, click 'Review' on the top right of the page.

You will then be shown a summary of all the courses you've selected from the course list. Double check your selected courses to ensure you have chosen the correct options to rollover. Once you are happy with your selection click '**Create course options**' located in the top right of the screen. You should then see a confirmation message. If there were any issues you will see a message stating which courses did not copy and why. Once finished you'll be returned to the Course Management page.

You can also roll over courses on an individual basis. To do this:

> Select the course you wish to update by clicking the corresponding '**View**' button on your course management list.

> Click the '**More**' button located in the top right-hand corner of the screen and select '**Create new academic year**'.

> Select the academic year that you want to create from the list available.

> Select the academic year that you want to copy from and click the '**Next**' button.

> Select the outcome qualifications/options that you wish to copy to the new academic year and finally click the 'Create' button.

Please note that courses are rolled over with the status of unpublished and closed to application. Follow the usual steps to set these courses to active when you are happy to. You can either do this in bulk via the 'Bulk Management' section of the tool, or alternatively click into each course and amend the course option directly.

Publication status: This controls whether a course is listed in our search and explore tools.

> If you set a course as '**Published**' it will be visible in the search and explore tools

> If you set a course as '**Not published**' it will not be visible in the search and explore tools

> Using this flag has no other implications in UCAS products or systems

Application status: This controls whether an application can be made to the course in Apply.

> If you set a course as '**Open**' it will display in Apply, and applicants can select it if it has vacancies

> If you set a course as '**Closed**' it will not display in Apply

Roll over checklist

When rolling over your courses to the subsequent intake be mindful that course information can differ from year to year so you may need to make amendments accordingly to the following sections:

> Course title

> Course description

> Modules

> Fees

> Start dates

> Study mode

> Qualification requirements

> Available entry points

> Additional requirements (e.g. criminal records declaration, interview information)

The Collection Tool has functionality which can assist you with the roll over process. For example, an all course report can be generated. For further information please refer to section 8 of this guide.

7. Bulk updating course information

To change course statuses, or information in bulk, select '**Go to course management**' from your dashboard.
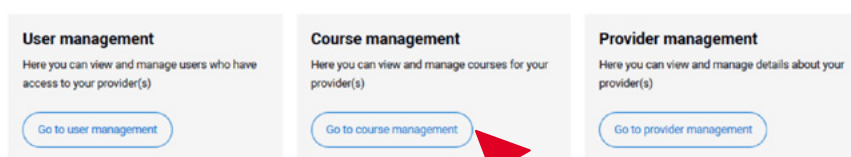
Once on the course management page, you'll see three dots '...' in the right-hand corner of the screen.
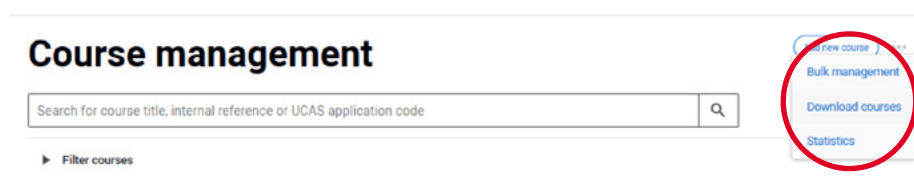
Once selected, the three dots will display a menu with three options – 'Bulk management', 'Download courses', and 'Statistics'. Click '**Bulk management**' to go to the 'Bulk course management' screen.

Bulk course management

The first question is '**Which bulk action should be applied?**'. You will have three options:

> Edit course status

> Edit course Information

> Rollover course options to a new year

Rolling over courses is covered in section 4 of this guide. Selecting either of the other options will produce a second drop-down to list specifically what you would like to amend:

Edit course status

> Application status

> Archive status

> Publication status

> Vacancy status

Edit course information

> Additional requirements

> Deferred entry

> English language requirements

> Fees

> Start dates

> Undergraduate qualification requirements

> Vacancy status

Once you've chosen the option you want to bulk update, a '**Next**' button will be displayed in the top right-hand corner of the page. Once clicked, you can choose how you want to amend the status – for example, '**Open to applications**' or '**Close to applications**'.

Bulk course management

Once selected, click the '**Next**' button in the top right of the page.

You'll then be presented will all the courses which are available to bulk update.

If a course isn't appearing, it's because it already has the status you're trying to assign to it.

You can use the filter to narrow down particular course types, e.g. academic year, scheme, or location.

Either click the individual course's tick box to make your selectio,n or choose the '**Select all**' option above the course list. Once selected, a Review (X) in the top right of the page will be displayed. Click this, and you'll be given a list of the courses you've chosen.

Double-check this list to ensure you're selecting the correct courses.

A button will now be available in the top right of the page to complete the process. Once clicked, a window will appear to confirm the updated status.

8. Reporting

The Collection Tool can generate reports in order to assist you with your course management. To access the range of reports available, select '**Go to course management**' from your dashboard.

On the course management page you'll see three dots '...' in the top right-hand corner

Once selected, the three dots will display a menu with three options – '**Bulk management**', '**Download courses**', and '**Statistics**'.

If you click '**Download courses**', a pop-up window will display showing all the available options for you to run reports against.

Potential reports include:

> a complete list of your postgraduate or undergraduate course information

> fee information for any scheme

> reporting to support your KIS/ Unistats returns, that you may be required to do each year

Once you've selected the tick box for the reports you require, click '**Next**' in the lower right of the screen. Your report will then be generated as a CSV file, and a download button will be displayed.

Download course information

Which course data would you like to download?

☐ PG courses

☐ UG courses

☐ PG fees

☐ UG fees

☐ UG additional requirements

☐ UG qualification requirements

☐ UG English language requirements

☐ PG English language requirements

☐ Unistats

☐ Vacancy status

☐ All

Cancel   Next

Click '**Download**', and you will be asked where you would like this information to be downloaded.

File generation complete

Your files are ready to download

PG courses   ✓

Cancel   Download

Collection Tool help

If you require a report that is not available by default, please get in touch with **coursesdata@ucas.ac.uk** and the team will be happy to help you.